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A case study of inclusive school development: a journey of learning

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A global recognition of students' rights requires school organizations to recognize, value and provide for diversity. The move towards more inclusive schooling in Queensland, Australia, requires schools to address professional development on two levels: reculturing of the school to reflect inclusive beliefs and values; and enhancement of teacher skills and knowledge to better address the learning needs of all students. The recently developed *Index for Inclusion* 2000) is one resource that can facilitate the process of professional development and facilitate change in school culture, policy and teaching practice. The process used incorporates a critical friend and peer mentoring model within an action research framework, which together provide benefits for all involved in the professional development process. The journey of learning incorporating the phases of the *Index for Inclusion* are reported along with discussions for future directions.

Inclusion: process or product?

Inclusion has developed from a long history of educational innovation and represents school improvement on many levels for all students (Skrtic et al. 1996). Above all, inclusion is about a philosophy of acceptance where all people are valued and treated with respect. Indeed, it is argued that inclusion is unending, so that there is no such thing as an inclusive school (Ballard 1995). According to this notion, all schools can continue to develop greater inclusion, whatever their current state (Sebba and Ainscow 1996). Recent understandings of inclusive schooling have described a process that fosters participation by all pupils and staff as a base for future school development (Bines 2000). This is because the introduction of inclusive policies and the ever increasingly diverse learning needs have forced school staff to change their approach to organization of students, models of support, teaching staff roles, and approaches to teaching and the curriculum. Because inclusion can be understood as a process rather than the pot of gold at the end of the rainbow, there are strong links to school and staff development and processes for managing change.

Managing change in education

The rate of technological change and the rapid movement of Australia into the global community will continue to increase the complexity of schooling, thereby challenging schools to be more effective in this new environment. Indeed, schools could be described as the shock absorbers and buffers for societal change (Luke 2000). Challenges and new directions for education in Queensland, Australia, are expressed in the document *2010 Queensland State Education* (Education Queensland 1999). It describes a consensus around the need for schooling not only to focus just on employment, but also to enhance social cohesion through a sense of community and cohesion. The prime educational goal is to increase student achievement levels.

Previously in Australia, teachers and schools have experienced imposed change in the form of systems initiatives and departmental mandates. This 'everyone must love it or else' dictum (Hughes and Anderas 1995: 30) resulted in superficial reforms at best and more frequently in passive resistance and alienation. Whereas in truth it is the thoughts, words, deeds and hearts of members of the school community that create or stifle change. It has been widely recognized that 'effective change occurs when it happens from within' (Hughes and Anderas 1995: 29) and that an organization's culture shapes the energy of the workplace to respond to change and reach goals (Voutas 1999).

In Queensland, the responsibility for professional development, once a system responsibility, has been devolved mostly to school organizations. Principals have the role to manage the pace and path of change in schools: to manage the anxiety and stress that can accompany change. Because it is recognized that human minds need stability (Schein 1992), the change process needs to involve school leaders creating a climate of collaborative effort and ownership of the change process. However, to bring about effective change, school leaders and teachers must be actively involved in the change process together. This will determine the capacity of the school to become more inclusive. An inclusive school culture engages the school community in collaborative forms of learning and is underpinned by democratic planning processes.

Professional development model

Recognizing that teachers are the most critical actors in school reform (Hattam 2000), the model of professional development discussed in this paper attempts to enhance teacher learning through reflective practice and professional dialogue, with peers and a critical friend, whilst also addressing whole school reculturing. The term 'critical friend' can be described as someone outside the school who has been trusted to provide guidance and honest feedback. The first author, a university lecturer in inclusive education, took on the role of 'critical friend', researcher, and was the coordinator of data collection and analysis in the project. The partnership was truly collaborative with the university lecturer located in the primary school one day per week over a school year and considered by many in the school community as a member of staff. The second author worked as the support teacher for students with learning difficulties in the school and coordinated the project along with fulfilling the roles of peer mentor and researcher. The model incorporated staff meeting activities, group meetings for teachers (facilitated by the critical friend), professional dialogue with peers, collaborative planning and teaching with the critical friend and staff, as well as individual teacher planning and reflection time.

The model of professional development described here acknowledges the needs of individuals as well as the needs of the learning organization. The following features have been considered:

- Recognition and response to individual requests for increased knowledge and skills to meet diverse learning needs: Teachers are wary of the 'swinging pendulum' syndrome where it seems quick-fix innovations are periodically created and forced upon those at the bottom of the chain of command (Hughes and Andreas 1995). Teachers need to be in control of their own learning and development so professional development strategies have been designed to meet the diverse needs of a group of adult learners.
- Training, access to information and support must all be sustained, as 'staff development is most powerful when it is conducted long enough and often enough to assure progressive gains in confidence, knowledge and skills' (Little, cited in Phillips and McCullough 1990: 301): As change is a process not an event (Hord *et al.* 1987), members of organizations have to be trained and continuously retrained throughout their career (Johnson and Johnson 1994: 113).
- The professional development process involves collaborative partnerships and peer mentoring: Gersten and Brengelman (1996) argued that professional development activities must include opportunities for discussion with colleagues. Peer collaboration will contribute to the development of an inclusive school culture, which is committed to change, and creating better learning opportunities for all students (Carrington and Elkins 2002). The sharing of successes and difficulties in the application of new strategies facilitates learning about the underlying concepts. Peer collaboration and mentoring reduces isolation creating more open and critical feedback, encourages risk taking and diversity, provides more and continuous opportunities to learn, and reduces workload (Voutas 1999).
- Teachers are encouraged to consider collective school beliefs, values and knowledge and the influence of these on school organization, policy and practice: 'A school's philosophy is the foundation stone for quality teaching and learning in a quality environment', and Voutas (1999:16) warned that without a shared vision a school has little or no direction. This shared vision contributes to the culture of a school. Opportunities for school staff to reflect and possibly reconstruct beliefs and values related to student rights and education will affect how teachers think about schooling, their students, the curriculum and their own teaching approach (Carrington 1999). Increased collegiality and cooperation between staff result in organizations where all participants are recognized as having knowledge to share with others.

Index for inclusion

The *Index for Inclusion* is designed to support schools in a process of inclusive school development and was developed in the UK at the Centre for Studies in Inclusive Education (CSIE) in collaboration with the University of Manchester and University of Christ Church College Canterbury (Booth *et al.* 2000). The *Index* provides a framework for school review and development on three dimensions: school culture, policy and practice. 'It is important to remember that the dimensions overlap: developments in school cultures require the formulation of policies and the implementation of practice' (Booth *et al.* 2000:10). The *Index for Inclusion* enabled teachers and the school community to become involved in the process of school development and change.

Each dimension of the *Index* is divided into a number of indicators. 'The indicators represent statements of aspiration against which existing arrangements can be compared in order to set priorities for development' (Booth *et al.* 2000: 11). Following each indicator, a number of questions can be used to encourage thinking about various issues related to inclusive education. The intent is threefold: (1) to establish existing knowledge, and understandings about culture, policy and practice in the school, (2) to consider priority areas for school and teacher development, and (3) to manage and document the process of change. There are five phases in the *Index* process:

- Phase 1: Starting the *Index* process.
- Phase 2: Finding out about the school.
- Phase 3: Producing an inclusive development plan.
- Phase 4: Implementing developments.
- Phase 5: Reviewing the *Index* process.

Description of this study

This paper reports on the use of the *Index for Inclusion* in a collaborative project between Queensland University of Technology and a large primary school. The first author (from Queensland University of Technology) worked as a critical friend, peer mentor and researcher in the school. She worked in the school for one day in most school weeks of the school year. The second author worked as the learning support teacher in the school, peer mentor and researcher. The role of critical friend included leadership in whole staff in-service sessions, mentoring of individual teachers, provision of information and resources, and involvement in planning and development meetings. In contrast, the peer mentoring relationship requires a more equal relationship between colleagues in which both participants have knowledge and skills of value.

Setting

The school was selected for two reasons. First, staff expressed an interest in teacher and school development for improving learning and participation for all students in the school. Second, the researchers and school were able collaboratively to access funding for the project. The school is one of three state primary schools located in one of the fastest growing areas of Australia. Located in Queensland, the suburb has been rated in the top 10% of the most disadvantaged areas in Queensland. A lack of public transport, community services and employment opportunities have been identified as the major problems facing the area. Consequently, the school in this community addresses a range of complex social and community issues. Students attend the school from Preschool to Year 7. The school incorporates one of the largest Special Education Units (for students with significant disabilities) in the state as well as a Special Education Development Centre (for students with significant disabilities from birth to preschool age) and 2 Preschool Units. The school enrolment is 730 students with a further 100 children attending the Preschool.

Participants

A dual approach was taken to professional development in the school: staff meeting activities for the whole staff, combined with a small group approach (voluntary) where personal professional development needs were met in a more intensive way. Data were collected in staff meetings, which included 48 teaching staff and three administrators, including the principal. The small group of teachers who participated in the study included two preschool teachers, two part-time grade two teachers who were working with one group of students, and one teacher from the Special Education Unit.

Data collection

The ongoing conversations and practices associated with the collection and review of data in the *Index* process can be described as action research. Action research is a cyclical process in which action alternates with critical reflection (McNiff *et al.* 1996). This model acknowledges that new issues may emerge and develop during the study and mirrors the complexity of working in school environments.

Data collection methods included focus group interviews, surveys and reflective journals (first and second authors). Data analysis was both inductive and deductive in nature so that themes and categories that emerged were compared with descriptive survey data. The analysis was further influenced by the literature that informed the research so that there was constant comparison across and between categories and phenomena (Strauss and Corbin 1994). Interviews were transcribed and imported into Q.S.R. NUD*IST (Non-numerical, Unstructured Data Indexing, Searching and Theorising) (Richards and Richards 1994) for coding. Reflective journals were also imported into Q.S.R. NUD*IST. Survey data were collated and presented descriptively. This type of research design can assist in the 'construction of meanings of inclusion and creating the practices that are said to be inclusive' (Clough and Barton 1995: 12). The case study data reported here were collected within the context of a larger research project. Only selected data have been reported.

Journey of learning

Users of the *Index* are encouraged to adapt and create their own ways of using the materials in the process of school and professional development (Booth *et al.* 2000). This section will document the process and stages of the professional development journey for the study participants and researchers. Data collection, findings, reflections and actions will be documented for each stage of the process. Consideration has been given to the key aspects of the *Index* process: identification of professional development needs, development of a plan of action to meet those needs, and implementation and review of the process.

The journey of professional growth and learning described here began with a series of meetings at the school (Phase 1: Starting the *Index* process). The first author, second author, deputy principal and principal established a collaborative relationship aimed to address the professional development needs in the school. Individuals in this group familiarized themselves with the *Index* and the associated process stages and discussed the school and community.

Reflection:

We have found that different people in the school have joined the coordinating group for discussion and planning at different points in time. For example, the school guidance officer was involved in planning staff group activities related to staff and student interactions. The coordinating group understood that it wasn't always possible for a larger group of people to meet. Parents and students have not been involved yet in any formal way in planning associated with the *Index*, however the coordinating group believe that there will be time later for greater collaboration in the school community. (first author)

This second phase of the process (Finding out about the school) was used to collect information about the school to help set priorities for development. This stage is an important part of the process to ensure ownership and commitment to the programme of school and staff development.

A full day of meetings took place between the critical friend (first author) and the whole staff on a pupil free day. Staff were organized into three groups of year levels and teaching areas. The first author facilitated each group with the following focus: (1) short presentation of a model for professional development incorporating the *Index* and including plan for whole staff activities, and small group voluntary activities; (2) identification of barriers in the school that impede student learning and participation; and (3) brainstorming of focus areas for staff and personal development in the school. Each session was introduced by the principal who established links to current Queensland State Education priorities and initiatives. Each group worked with the critical friend for 1.5 hours. Data were collected from each group in the form of a written record of the barriers for learning and priorities for professional development. An example of data indicating priorities for professional development issues are presented in table 1.

Table 1. Examples of priorities for professional development

Description of group of teachers	Priorities for professional development	Link to Index dimension issues
A: Preschool and Years 1-3	need to refocus on time spent in preventative behaviour management strategies rather than too much time spent on reactive behaviour management strategies	practice culture
	strategies for development of social skills to increase on-task behaviour, anger/frustration management, communication skills	policy practice
	classroom organization strategies for group work behaviour and independent learning behaviour	practice

The data from all groups were collated and (1) presented to the school administration team for future action, and (2) used to inform the development of whole school and focus group professional development activities. Identified needs from each group were targeted as priority for whole school development and influenced the choice of *Index* activities used in staff meetings.

The coordinating group used the collated data to develop a plan for whole school development and focus group professional development. Priorities for whole staff development activities were: (1) collection of views concerning staff perceptions of the school culture, and (2) discussion and sharing of views concerning policies and practices in the school specifically relating to staff-staff interactions, staff-student interactions and student-student interactions.

Priorities for focus group development were taken from the priorities for each group such as those reported in table 1. Participation in the focus groups was voluntary and teachers were grouped in similar year level groups with the addition of some specialist staff. This paper briefly reports on the data collected for the first focus group (Preschool, Grades 1-3, and special education staff) and focused on supporting classroom teachers in the creation of an inclusive classroom environment in which learning and participation are maximised. Figure 1 outlines the process of Phases 1 and 2 of the *Index* followed by Phases 3 (plan), 4 (implement) and 5 (review).

Phases 1-3 involved a cyclic and spiral process incorporating the phases of planning, implementation and review for whole staff and the focus group teacher development. This process reflects the action research model (McNiff *et al.* 1996) and is linked to the critical friend and peer-mentoring roles and the journey of learning experienced by all. The first focus group session ran over 5 weeks concurrently with the planning and implementation of whole staff professional activities. The authors in their roles of critical friend, and peer mentors to each other and to the teachers, were continually learning from each other and growing professionally. The processes of planning, implementation and review were constantly swirling in cycles and spirals in the complex environment of school.

Phases 1 and 2

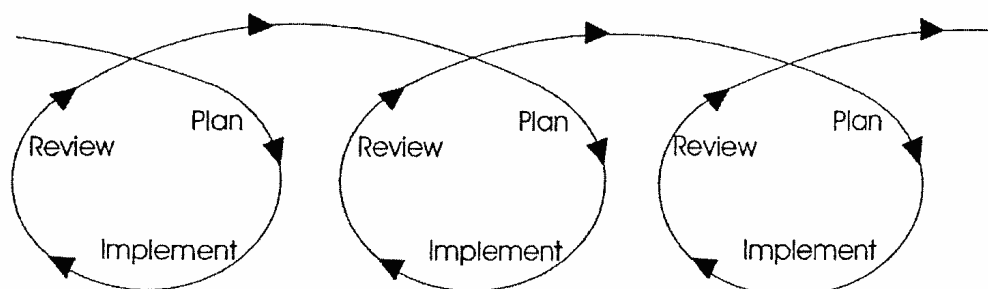


Figure 1. Cyclic and spiral process incorporating the five phases of the Index process.

Focus group professional development

Focus groups were voluntary and individual teachers controlled the pace and specific path of their learning because they were provided with opportunities to access information and develop a degree of control and ownership over their learning. There were five teachers in focus group one. The model incorporated group time facilitated by the critical friend, professional dialogue and sharing with peers, visits and collaborative planning with the critical friend and with each other as peer mentors, and

individual planning and reflection time. Some relief from teaching duties was provided for teachers at different stages in the process. Data were collected in each stage.

Reflection: Being in control of their own learning provided an initial hiccup for members of the first focus group. After volunteering, teachers needed to adjust to the notion that they were directing their own learning-that they were not being told what or how or when to learn. Open communication was fostered and members were strongly encouraged to feel comfortable and express opinions and thoughts on issues. (second author)

A small sample of interview data demonstrates the perceived advantages in using the *Index* processes that encouraged collaboration and participation in the teacher development process incorporating the role of the critical friend.

As well as these chats, it's been really wonderful just having the one-on-one talks with you (critical friend). I think I tend to be stuck on the same ideas and strategies because of what worked last year even though it hasn't been working this year. (special education teacher)

I have really valued the time to be able to share and chat and be able to talk to you (critical friend) individually, to be able to access things that I wouldn't normally know about or get to learn about. I think sometimes you can feel quite isolated, like sometimes just the chance to be able to talk to people and be able to say: 'Hey, yeah, look you're not the only one with hassles and whatever'. (preschool teacher)

Whole staff development activities

Whole staff development activities were designed for staff meetings during the year. These have been described as *Index* Activities that were designed by the present authors. The activities included adapted questions from the indicators in each dimension. In this section, two examples of *Index* activities are presented with the associated data to inform ongoing development and learning for the school staff.

Index activity one

The critical friend presented a seminar to the staff entitled 'Enhancing Learning and Participation' in the first term of the school year. This presentation (1) reviewed some of the barriers to learning that were identified in Phase Two of the *Index* process; (2) provided an opportunity for staff to discuss their understandings about inclusion; (3) provided information about the *Index* process; (4) suggested some ideas that can be used in the classroom to provide learning programs for a diverse group of students; and (5) collected data from the whole staff on their views about the current school culture.

Two formats were used to collect data from staff about their views on the culture of the school. A short survey was constructed using a selection of questions that were modified from the *Index*, Dimension A: Creating Inclusive Cultures; Indicator 2.2: Establishing Inclusive Values. The questions were selected and modified. The aim was twofold: to acquaint all staff with the *Index* process, and to gather data about staff values related to inclusive schooling. Results are presented in table 2.

The values related to supportive school community and collaboration with staff received agreement from a high percentage of staff. For example, 84% of staff indicated that the building of a supportive school community is as important in the school as raising academic achievement. Two other questions received a high percentage of agreement from the staff: 65% of staff believed there was a strong value in the school to minimize inequalities of opportunity and 78% of staff believed that staff shared a wish to accept students from the local community irrespective of background. These data supported staff commitment to inclusive school development in the school.

Table 2. Data from Index activity one, survey

Indicator a 2.2 Establishing inclusive values	Indicator a 2.2 Establishing inclusive values	Yes (%)	Not sure (%)	No (%)
Is the building of a supportive school community seen to be as important as raising academic achievement at XXX School?		84	9	7
Is the fostering of collaboration between staff seen to be important at XXX School?		87	9	4
Is there an emphasis on valuing difference rather than conforming to what is normal at XXX School?		42	49	9
Is there a shared value to minimize inequalities of opportunity at XXX School?		64	27	9
Do staff share a wish to accept students from the local community, irrespective of background?		78	11	11

The second part of the activity involved teachers writing a sentence or phrase to describe the culture of the school. The aim was to establish shared understandings between staff. Examples of data collected in this part of Index Activity One are reported in table 3. Data generally support the inclusive values reported in table 2. However, there is also evidence of the challenge and stress involved for these teachers in their roles as teachers with such a diverse group of students.

Table 3. Selected data, staff understanding of the school culture

Examples of staff understandings of the school culture
A school that has a diverse community-social, emotional, economic, etc.-that strives to cater to the needs of our students (as much as financial setbacks may undermine our efforts)
Tolerant of differences; mindful of children's needs (e.g. background-culture, family situation); special needs; serious commitment to intervention; positive environment (e.g. many awards for positive behaviour)
Children of this school are very challenging and often unappreciative, but if the staff are supportive and understanding of one another we may make a difference to some of them

Index activity two

This activity was planned by the coordinating group in response to high levels of staff stress related to managing student behaviour in the school. This activity aimed to address the need for staff to share understandings and collaboratively identify priority areas for development in staff-staff interactions, staff-student interactions and student-student interactions in relation to behaviour management issues. The activity required staff to work in groups of four to five teachers from across the school. To facilitate this process, staff were provided with a handout for the session with different coloured sticker dots in the corner. Groups were then arranged according to colour. This process ensured that groups were mixed from across the school to facilitate discussion and share the diversity in understandings across the school.

Table 4. Index activity two data for group four

Behaviour management: policy and practice	Yes	Not sure	No
Question 1: Are there meetings involving staff, students, parents/carers and others that attempt to deal with problems flexibly before they escalate?	✓✓		
Question 2: Are responses to the behaviour of students always to do with education and rehabilitation rather than punishment?	✓	✓	
Question 3: Is there a shared view of what constitutes bullying between staff, parents/carers and students?			✓✓
Question 4: Can the behaviour of students be related to their need for power?	✓✓		

Table 5. Group discussion data for group four

Question number	Comments
1	We have processes that aim to deal with the problems involving staff, students, and parents/carers before they escalate (Note: these are not always successful and depend on individual parties' attitudes.) Yes, these occur regarding learning needs, physical and emotional needs, and behaviour management. These meetings occur at different levels (e.g. parent-teacher) or can include outside agencies where appropriate
2	Yes, unanimous response. The focus of behaviour management is to do with education and rehabilitation. Not punishment-consequence of behaviour choices. We have a problem with 'always' in the question. We TRY to make consequences educational in rehabilitation
3	No, there is not a shared view of what constitutes bullying, i.e. parents/ teachers/students varied views. No, but there is a shared view as far as staff is concerned but this does not always extend to parents and children
4	Some behaviour could be related to power. Not all behaviour is related to power-emotional response. Some is attention-seeking, etc. Child-to-child could be a power response-only model of power they have encountered. Yes, students have problems because of either a feeling of too much or too little power or control

There were two groups working on each area and each group was provided with four to six questions taken from selected indicators in the *Index* and asked to place each question in an A4 document holder to indicate yes, no or not sure. The document holders were clipped together with the recorded notes taken from the group (one member was a scribe). This process ensured the data from each group were comprehensive and collated for analysis. An example of data collected in this activity is shown in tables 4 and 5. The data in table 4 indicate that both groups of teachers agreed with questions 1 and 4, and both groups disagreed with question 3. The examples of the discussion for each question are recorded in table 5. The comments provide more depth to the decisions made by the groups of teachers. For instance, in question two, the second group chose to vote 'not sure' because they did not 'like' the meaning of the word 'always'.

Summary and future directions

The data presented here indicate that the *Index for Inclusion* provides a useful framework for professional development related to inclusive schooling. Development in this project occurred on

two fronts: at a whole school level through an analysis and revisiting of the beliefs and values underpinning policy and practice at the school and at an individual level through the enhancement of teachers' knowledge and skills. The *Index* process clearly encourages communication and collaborative problem-solving between members of a school community. One of the authors of the *Index*, Mel Ainscow, has previously spoken about the need for collaboration and development of a common language with which teachers can talk to one another about teaching practice. The *Index* process has been enhanced by the professional development model cultivated in this collaborative university and school partnership which engaged teachers in professional dialogue at a number of levels. The combination of the roles of critical friend, peer mentors and use of the action research model of cycles and spirals (McNiff *et al.* 1996) has ensured a depth of learning for all involved in the process.

The findings from this case study are significant in the ongoing development of models of review and development of school culture, policy and practice for more inclusive schooling. Importantly, the focus on curriculum, pedagogy and staff pupil relationships have contributed to the extension of teachers' practices in teaching, learning and assessment to meet the needs of diverse learners. In addition, the enhancement and maintenance of a culture of innovation and high teacher morale is an ongoing aim of the second stage of this study. This ongoing process will ensure that this model for inclusive school development addresses school culture, policy and practice through collaborative reflection and learning that will result in improved outcomes for teachers and students.

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